



Center for Procurement Excellence

# FORM-6610<sup>©</sup>

## Request For Proposal Food Services Management and Operation

**<<INSERT ORGANIZATION NAME>>**

**<<INSERT PROJECT NAME>>**

*This document is copyrighted by the Center For Procurement Excellence, and cannot be copied or reproduced without the written approval of the Center For Procurement Excellence.*

For Reference

<<INSERT ORGANIZATION NAME>>

# Request For Proposal

## Food Services Management and Operation

<< Insert Project Name >>

RFP Number: <<Insert RFP Project Number>>

RFP Release Date: <<Date>>

---

### RFP CONTENTS

Section 1	Statement of Work	Page 1
Section 2	Current Conditions	Page 3
Section 3	Proposal Requirements	Page 4
Section 4	Evaluation Procedure	Page 7
Section 5	Administrative requirements	Page 10
Section 6	Proposal Forms	Page 13
Section 7	Attachments & Exhibits	Page 24

# SECTION 1

## STATEMENT OF WORK

### 1.1 PROJECT SUMMARY

The Owner is soliciting proposals for (insert 1 sentence that briefly describes the scope of work. Try to describe at a very high-level and avoid any technical language or specifics. Should be brief and explain the goods or services sought or a summary of the problem to be addressed. Note that the project details / technical requirements will be described in a later portion of this Section).

### 1.2 FINANCIAL CONSTRAINTS

Clearly define any financial constraints or expectations that you have.

### 1.3 SCHEDULE

Clearly define any schedule constraints or expectations that you have for the project. Note: this is not the procurement schedule requirements, but the post award schedule requirements. Is there a required date that the Contract must begin on? Are there any special dates or times that the contractor should be aware of (normal business hours, after hours, support, emergencies, planned shutdowns, holidays, days that contractor is not allowed to work, project opening ceremony, etc.) If there is a mandatory start date, you must identify is it more important to meet the budget constraints or the schedule constraints (you must pick one as more important than the other – they cannot be equally important)

### 1.4 SERVICE LOCATION

Identify where the services will be provided. Provide a map/sketch. If possible, identify parking, critical areas that cannot be impacted, etc.

### 1.5 GOALS

- What is the driving force/need for having this project/service procured?
- Describe what problems, issues, obstacles, challenges that you are facing now, which you are trying to solve with this procurement
- Identify the major goals, expectations, objectives, or benefits of the new project
- Consider any Contractor Goals: Identify the goals and expectations that are specifically related to the contractor. Think about what the contractor needs to accomplish to receive a 10 / 10 rating when the project is complete

### 1.6 UNIQUE CONSIDERATIONS / CHALLENGING REQUIREMENTS

- Identify any unique requirements about this project that may not be common/typical to other similar projects that contractors have performed.
- Identify anything about this project that would make it more challenging or unlike other project that a contractor has performed.
- Identify anything about the Owner (or the User) that would make it unlike any other project that a contractor has done.
- Identify any unknown conditions that you are aware of
- List anything that is excluded from this Project that the contractor should be aware of
- List any future conditions, outside of this scope that the contractor should keep in mind
- Identify if you have made any assumptions (about the project, products, procedures, or the contractor)
- Is there anything else that could cause a potential surprise or pose a significant challenge

## 1.7 DETAILED TECHNICAL REQUIREMENTS

- You can attach (and reference) exhibits to make this easier to follow (i.e. drawings and specs). State that “More detailed project information is included to enable you to provide an accurate proposal. This information is located in Appendix B”
- Referenced Exhibits may include: Pictures, Site plans, Drawings, Exhibits, etc.
- Provide all requirements that must be met to achieve a 100% performance satisfaction.
- This may include any specifications, details, service levels, etc.)
- Describe each of the deliverables/products/services to be provided by the selected contractor for this scope of work
- Describe the minimum requirements that must be performed by the contractor or accomplished by the new project to meet the goals/expectations

## 1.8 ADDITIONAL INFORMATION

- Describe the roles, responsibilities, and involvement (of the Owner) throughout the duration of this project/service
- If applicable, describe any alternatives or options that you would like pricing on (that should not be considered part of the base proposal)

For Reference Only Full Legal Review Recommended

**PURPOSE:** Paint a picture of your current environment so the Offerors know where you are at, what issues you are currently attempting to solve, and what they may encounter when addressing the Statement of Work. This information will help Offerors minimize their contingency costs by better understanding your current environment.

**2.1 ABOUT THE OWNER**

Provide a brief / high level overview about the Owner, Agency, Department, or Organization. Consider identifying the major goals of the organization or mission statement (if this is a Public Agency, provide brief overview of who the Agency serves). If applicable, provide any background information about the client/user that is purchasing this project.

**2.2 EXISTING CONDITIONS**

Provide all known existing conditions about the site, project, requirements, etc. This information will help the Offerors in identifying your existing situation. This can include:

- Identify the location of the current or existing project/building where services are to be provided.
- Identify if there are any constraints or issues with this location.
- Identify if there is anything that makes this location unique (that service providers might not be used to or might not have encountered in the past)
- Who are the critical stakeholders/users/tenants
- What issues, risks, challenges have you encountered faced with this project/service/building in the past
- Describe any unique issues/challenges that you have had (with project, site, building, etc.)
- Paint a picture of your current environment so the Offerors know where you are at, and/or the minimum level of service expectations
- Historical information relating to financial performance of the contract (# of meal plans purchased, annual revenues, other proforma detail)

For Reference Only

**3.1 DATE AND TIME REQUIREMENTS**

All proposal packages MUST be received before the date and time indicated in the Procurement Schedule in Section 1 (“Proposal Due Date”). Late submittals will not be accepted or considered. It is the responsibility of the Offeror to ascertain any additional security requirements with respect to packaging and delivery to the Owner. Offerors should be mindful of any potential delays due to security screening procedures, weather, connectivity issues, or other delays whether foreseeable or unforeseeable. Failure to submit a response before the Proposal Due Date will result in disqualification of the Proposal.

**3.2 GENERAL FORMAT**

All materials submitted SHALL become a part of the proposal, and may be incorporated in a subsequent contract between the Owner and the selected Offeror. All responses/submittals to this RFP SHALL be made in accordance with the format outlined below. Failure to submit in the requested format or failure to submit all the required forms may cause a proposal to be deemed non-responsive. The format for the proposal includes the following:

- Shall be written in the English language
- Submitted on standard 8 ½” x 11” paper size using the format that is specified and required in this RFP and each Submittal Form.
- Use Arial or Calibri font, and must have a minimum font size of 10.

**3.3 SUBMISSION REQUIREMENTS**

<<Identify if the Proposal will be submitted via Hardcopy, Online Electronically, or both>> For Example:

The Offeror SHALL submit one (1) hardcopy proposal package. The proposal package SHALL contain two (2) separate and sealed envelopes, and a USB data stick containing the following information:

ENVELOPE 1: Contains Submittal Form A-G

ENVELOPE 2: Contains only Submittal Form H (Cost Proposal)

USB Data Stick: Containing an electronic copy of the hardcopy proposal response

The proposal package SHALL be submitted in a sealed package containing the two separate envelopes. The Cost Proposal MUST be submitted in a separate sealed envelope within the proposal package (as noted above). The proposal should be stapled together or bound in a three-ring binder. Please do not bind the proposals in any other fashion to allow for easy duplication and distribution. The package SHALL include all required Submittal Forms. The package MUST also contain 1 USB data stick containing a copy of the hardcopy proposal. The electronic files should be saved in MS Word or Adobe PDF file format. Note: if there are any discrepancies between the USB documents and the Hardcopy documents, the Hardcopy documents will take precedence. The package SHALL be addressed and mailed to the Owner and clearly labelled as follows:

<<Insert Owner Name>>

<<Insert Buyer Name>>

<<Insert RFP Number>>

<<Insert Project Name>>

<<Insert Address>>

The Offeror must submit one (1) electronic proposal using the electronic procurement system (see Section 1.7). All files must be in Adobe PDF, MS Word or MS Excel format. <<Insert any additional requirements of the electronic procurement system>>

**3.4 SUBMITTAL FORM TEMPLATES**

The Offeror must ensure that their response meets all form and content requirements detailed within this RFP. This RFP contains Submittal Forms, which must be used by the Offerors to submit their proposal. Offerors shall NOT re-create these Submittal Forms, create their own Submittal Forms, or edit the format structure of the Submittal Forms (page sizing, font type, font size, page margins, etc.) An electronic copy of each Submittal Form is posted along with this RFP. The Offeror must download, complete, and submit each Submittal Form in their Proposal Package. Any proposal that does not adhere to these requirements may be deemed non responsive and rejected.

**3.5 SPECIAL FORMATTING REQUIREMENTS**

The Offeror MUST ensure that their Proposal meets all of the special formatting requirements identified in this Section. This includes requirements regarding anonymity and maximum page limits.

**Anonymity:** The Submittal Forms listed below MUST NOT contain any names that can be used to identify who the Offeror is (such as company names, company letterhead, personnel names, project names, contractor names, architect names, engineer names, subcontractor names, subconsultant names, manufacturer or supplier names, or product names).

**Page Limits:** The Submittal Forms listed below have maximum page limit requirements. Offerors MUST NOT exceed the maximum page limits. Note, the page limit applies to the front side of a page only (for example, ‘1 Page’ implies that the Offeror can only provide a response on one side of a piece of paper).

**Cost Information:** Cost information shall only be contained within Submittal Form I. No other document or Submittal Form may contain cost or fee information

Submittal Form	Anonymous Document	Maximum Page Limits
Submittal Form A – Offeror Background		
<b>Submittal Form B – Contract Approach</b>	<b>YES</b>	<b>1</b>
<b>Submittal Form C – Narrative Proposal Items</b>	<b>YES</b>	<b>2</b>
<b>Submittal Form D – Narrative Proposal Items as Needed</b>	<b>YES</b>	<b>2</b>
Submittal Form E - References		
Submittal Form F – Transition Milestone Schedule		
Submittal Form G – Cost Proposal		

Any Submittal Form that does not follow these instructions may receive a ‘0’ score for the evaluated Submittal Form, or the entire response may be deemed non responsive and rejected. The Owner also reserves the right, in its sole discretion, to modify a Proposal to remove any minor information that may be non-compliant.

**3.6 OFFEROR BACKGROUND (SUBMITTAL FORM A)**

The Offeror must complete and sign this Submittal Form. This document shall be signed by an individual that has legal authority to bind the responding entity. This document requests: name and contact information of individual(s) authorized to represent the Offeror, names of key team members of the Offerors project specific team, and confirmation certifying receipt of all addenda.

### 3.7 CONTRACT APPROACH (SUBMITTAL FORM B)

The Contract Approach should be a brief roadmap that describes, in major activities or tasks, how the Offeror will meet the Owner's expectations (cost, time, resources, quality, and expectations) as set forth in this RFP. This should be a concise synopsis of the work and approach that will be taken to complete this project. This summary should demonstrate to the Owner that the Offeror can visualize what they are going to do before they do it. *Note: See Section 4.5 for Special Formatting Requirements.*

### 3.8 Narrative Proposal (SUBMITTAL FORM C)

- If applicable:
  - o Insert other proposal items to be evaluated

### 3.9 Narrative Proposal as Needed (SUBMITTAL FORM D)

- If applicable:
  - o Insert other proposal items to be evaluated

### 3.10 REFERENCES (SUBMITTAL FORM E)

The Offeror must provide a list of references for the Offeror and each individual (key personnel) that is listed in Submittal Form A. The references should be on similar projects or services that closely match size, complexity, and needs outlined in this RFP. The references must be from the end-client or users of the project or service, and not third-party consultants or Owner representatives. The Owner reserves the right to contact these references to gather information about their experiences and satisfaction with the Offeror's ability to deliver high quality of work.

### 3.11 TRANSITION MILESTONE SCHEDULE (SUBMITTAL FORM F)

The Offeror must identify their proposed transition milestone schedule for this project, which identifies the contract start date, any critical transitional activities in preparation of the new service, and date that the service actually begins.

### 3.12 FINANCIAL PROPOSAL (SUBMITTAL FORM G)

The Offeror must complete all information requested in this Submittal Form. The Offeror is not permitted to adjust or modify this Submittal Form in any way. The Offeror must submit their cost as requested in this Submittal Form in the format requested. The Offeror may not include additional rates, amounts, costs, information, exceptions, or limitations to their costs proposal. Failure to meet these requirements may deem the Proposal to be non-responsive.

*NOTICE: The Offeror shall NOT include pricing or cost information in any other Submittal Form. Failure to meet this requirement may result in immediately disqualification.*



**4.1 EVALUATION SUMMARY**

Proposals will be evaluated based on their overall value to the Owner, which includes both cost and technical factors (as outlined in this Section).

**4.2 CRITERIA AND WEIGHTS**

Proposals that are found to be responsive, will be evaluated and assessed in accordance with the evaluation criteria below.

Criteria	Points
Financial Proposal	300
Interview of Key Personnel <sup>1</sup>	300
Contract Approach	175
Narrative Proposal Items << Items from 4.8 & 4.9>>	125
References	100
<b>Total</b>	<b>1,000</b>

<sup>1</sup> If the Owner shortlists Offerors, only the shortlisted Offerors will be evaluated and receive points for interviews

**4.3 CALCULATIONS**

The Buyer will prepare a spreadsheet to input and analyze all Offeror information and evaluation scores. In general, the following approach will be used to calculate a Offeror's score for a particular criteria:

$$(\text{Offeror Rating}) / (\text{Best Rating}) * (\text{Weight Points Possible})$$

For example, if the Offeror received an '7' rating for interviews, and the highest interview rating was an '8', and the maximum points possible was '300', the Offeror would receive:  $(7)/(8)*(300) = 263$  points

**4.4 RESPONSIVENESS**

To be considered responsive, at a minimum, Offerors must complete and submit all of the required information (requested in this RFP and the Submittal Forms) on time and submitted as specified in this RFP.

**4.5 EVALUATION COMMITTEE**

An Evaluation Committee will be used to evaluate specific Submittal Forms of all responsive Proposals, and also participate in the Interview process. The Evaluation Committee is expected to contain approximately 3-5 individuals that may, or may not, have technical expertise with this particular type of project or service. Therefore, it is important that the Offerors prepare and submit non-technical documents (to the maximum extent possible).

The Evaluation Committee will be asked to independently review and score the Submittals/Interviews comparatively to one another based on a 1 to 10 scale. A "10" represents that the item being evaluated is significantly greater (or has more value) than the average. A "5" represents that the item being evaluated is about average (or there is insufficient information to make a dominant decision). A "1" represents that the item being evaluated is significantly below the average. The Buyer will verify each Evaluation Committee members score, and average the scores to obtain the final average score for each of the evaluated criteria.

#### 4.6 EVALUATION PROCESS

The follow procedures will be followed to prioritize Proposals:

1. The Buyer will review all proposals for compliance with mandatory requirements as stipulated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration. The Buyer may contact Offerors for clarification of the responses.
2. The Buyer will assign a unique code to each responsive Submittal to create anonymity.
3. The Buyer will provide specific Submittal Forms to the Evaluation Committee, which will anonymous/coded. No cost information, schedule information, or team information will be provided to the Evaluation Committee members during the evaluation process.
4. The Evaluation Committee members will independently evaluate and score the documents and submit their scores back to the Buyer. No group ratings, or consensus meetings will be performed.
5. The Buyer will input, calculate, and prioritize the data and evaluator scores.
6. The Buyer will then shortlist and identify, and invite, the three highest ranking proposals to participate in the Interview Process. Note: The Buyer may increase the number of shortlisted Offerors to include any other Offerors that have a total overall score that is within 5% of the third ranked Offeror's overall score.

#### 4.7 INTERVIEWS

The Owner may conduct interviews with the Key Personnel/Teams from each of the Shortlisted Offerors.

<<Insert Company's Standard Interview Language>>

<<Consider the Following Requirements/Items>>

Interviews are expected to last approximately 20 minutes per team. Interviewees will be prohibited from making any reference to their proposed cost proposal or cost information. Interviewees may be asked questions regarding their experience, knowledge and understanding of the scope of work, obstacles and challenges, strategies, and their plan/approach. The Owner may request additional information prior to interviews. After the Shortlisted Offerors have been interviewed, they will be evaluated and scored by the Evaluation Committee.

#### 4.8 FINAL PRIORITIZATION OF OFFERORS

After the Shortlisted Offerors have been interviewed, evaluated, and scored by the Evaluation Committee, the Buyer will perform a final prioritization based on the criteria and weights described in Section 5.2. The highest prioritized Offeror will be invited into the Clarification Period.

#### 4.9 NEGOTIATION/CLARIFICATION PERIOD

<Insert Company Standard Requirements/Practices>>

#### 4.10 AGREEMENT

The potential best value Offeror will be expected to sign the Agreement (Exhibit 1). By submitting an offer in response to this RFP, the Offeror expressly accepts the terms and conditions set forth in the applicable Agreement. Any attempt to offer terms inconsistent with, or in addition to the applicable standard terms in the Agreement shall be deemed ineffective. The Owner may consider requests to alter the Agreement, if these requests are made prior to the 'Deadline for Questions' identified in the procurement schedule (Section 1). Any changes, inconsistencies, or additional terms must be expressly accepted by the Owner in writing.

#### **4.11 AWARD PROCEDURES AND AGREEMENT**

The successful Offeror will be notified, in writing, when a recommendation for award has been completed, and of the award date of the contract. No payment can be made for action taken or work started prior to the award date of the contract.

#### **4.12 DEBRIEFING**

A debriefing document or debriefing meeting may be provided to all Offerors once the contract has been awarded. The debriefing may review the Evaluation Matrix with all information used to prioritize the proposals (cost and scoring in each criteria). The debriefing will not reveal the names of the Offerors (all information will be coded for anonymity). The purpose of the debriefing is to provide Offerors with useful feedback towards areas of continuous improvement.

For Reference Only Full Legal Review Recommended

## ADMINISTRATIVE REQUIREMENTS

## 5.1 OVERVIEW

The <<Organization Name>> (referred to as the “Owner” hereinafter) is issuing this Request For Proposal (RFP) to solicit proposals from Contractors (referred to as “Offerors”), to << briefly describe the scope of services>> <<Try to describe at a very high-level and avoid any technical language or specifics, which will be described later in this RFP>> Proposals shall be submitted in accordance with the requirements set in this document.

This contract will commence on <<Month Day, Year>>. The term of this contract is <<XX (##)>> years.

## 5.2 BUYER

The individual listed below (referred to as “Buyer” herein) is responsible for the conduct of this procurement. All questions, inquiries, concerns, or clarifications regarding this solicitation must be submitted electronically (via email) to this individual. Offerors shall not contact or communicate with any other Owner employees. Unauthorized contact about this RFP with any other Owner employees may result in immediate disqualification.

Contact Name: <<Insert Name>>  
 Title: <<Insert Title>>  
 Organization Name: <<Insert Name>>  
 Address: <<Insert Address >>  
 E-Mail: <<Insert Email>>

## 5.3 PROCUREMENT SCHEDULE

The Owner will make every effort to adhere to the schedule below. However, the Owner reserves the right, at its sole discretion, to adjust the RFP Schedule of Events as it deems necessary.

No	Activity	Time	Date
1	RFP Issued		xx/xx/xx
2	Pre-Proposal Meeting	9:00 am CST	xx/xx/xx
3	Site Visit	11:00 am CST	xx/xx/xx
4	Deadline for Questions	2:00 pm CST	xx/xx/xx
5	Deadline for Proposal Submission (Proposal Due Date)	2:00 pm CST	xx/xx/xx
6	Shortlisting		xx/xx/xx
7	Interviews	TBD	xx/xx/xx
8	Clarification Period Start Date		xx/xx/xx
9	Notice of Intent to Award		xx/xx/xx

## 5.4 PRE-PROPOSAL MEETING AND SITE VISIT

A pre-proposal meeting and site visit will be conducted to provide an overview of the project. Attendance at this meeting is not mandatory, but highly recommended for all Offerors. Please email the Buyer a RSVP with a list of personnel (first and last names, phone numbers, and emails) of individuals that will attend this meeting (to ensure there is adequate space for the meeting).

The **Pre Proposal Meeting** will be held at:

Address: <<Insert Address>>  
 Building/Room Location: <<Insert Location>>

The **Site Visit** will be held at:

Address: <<Insert Address>>  
 Building/Room Location: <<Insert Location>>

## 5.5 QUESTIONS, INQUIRES, CLARIFICATIONS, REQUESTS FOR INFORMATION

Offerors are expected to promptly review this solicitation, including all of the submittals, exhibits, appendix, and addendum. If there are any discrepancies, inconsistencies, or omissions, the Offeror shall immediately notify the designated Buyer. If the Offeror has questions or requires clarification of the scope of work, the intent, or any aspect of this solicitation, they shall immediately notify the Buyer. All questions, inquiries, clarifications, must be submitted to the Buyer by the due date identified in the Procurement Schedule.

## 5.6 ADDENDA

The Owner may issue addenda to make changes to the RFP, changes to the scope, respond to any questions, or provide clarification to information stated within the RFP. All written/published addenda shall become part of this RFP, and must be included by the Offeror in its proposal. All other communications are unofficial and non-binding.

## 5.7 ELECTRONIC PROCUREMENT SYSTEM

<<Insert language regarding the electronic procurement system that the Owner will use to collect Q&A, issue addenda, and receive proposal responses.>> <<Identify how to sign up for the system if they are new>>

## 5.8 GENERAL TERMS OF THIS SOLICITATION

The following terms and conditions apply to this RFP:

### A. PREPARATION COSTS

<<Insert language as applicable>> <<For example: All proposal responses and supporting documentation submitted to the Owner by the Offeror will become the property of the Owner. The Owner will not reimburse the Offeror for any costs associated with the preparation of the response to this RFP.>>

### B. PUBLIC DISCLOSURE REQUIREMENTS

<<Insert language as applicable>> <<For example: All documents submitted in response to the RFP will become a matter of public record and shall be thereupon considered public records.>>

### C. ERRORS OR OMISSIONS

<<Insert language as applicable>> <<For example: The Owner will not be liable for any errors or omissions in Offerors proposal. >>

### D. EXCEPTIONS

<<Insert language as applicable>> <<For example: Offerors are cautioned to limit exceptions, conditions, and limitations to the provisions of this RFP as they may be determined to be so fundamental as to cause rejection of the proposal for not responding to the requirements of the RFP. >>

### E. POST AWARD DEBRIEFING

<<Insert language as applicable>> <<For example: The Owner will provide an overview of the evaluation matrix that was used to prioritize proposals as outlined in Section 5. Offerors may request a debriefing within 30 calendar days after execution and delivery of the contract. >>

### C. REJECTION OF ALL PROPOSALS

<<Insert language as applicable>> <<For example: The Owner expressly reserves the right to reject any or all Proposals. The Owner may cancel this RFP at any time. The Owner is not responsible for any costs incurred by Offerors in the preparation and presentation of Proposals submitted in response to this RFP. >>

#### D. VALIDITY OF PROPOSAL

<<Insert language as applicable>> <<For example: Proposals submitted in response to this RFP shall be valid for a period of 60 days after the 'Proposal Due Date' in Section 1.3.

#### E. NEGOTIATION

<<Insert language as applicable>> <<For example: The Owner expressly reserves the right to negotiate with any, all or none of the Offerors, and waive informalities, minor irregularities and discrepancies, and award a Contract without interviews, discussions or negotiations.

#### F. PROTEST PROCEDURES

<<Insert language as applicable>> <<For example: The intent of this procedure is to provide Offerors with a process to formally object to the content of the solicitation documents, staff action, or a contract award. In order for a Protest to be considered, the Protestor SHALL adhere to the Owner's protest procedures which can be found online at <<xxxxxxx>>. All protests must be submitted and filed within the time limits specified in the protest procedures.>>

#### G. POST PROJECT EVALUATION

<<Insert language as applicable>> <<For example: The successful Offeror, which is awarded this contract, will be evaluated upon completion of the project, the Owner will evaluate their overall satisfaction of the project and Offeror. This includes (but is not limited to): overall quality, ability to manage the project, ability to minimize complaints, ability to minimize the Owner efforts, ability to minimize project delays, ability to minimize cost increases, and submission of accurate and timely Weekly Risk Reports. The final assessment may be used to document the performance of the Offeror and critical components of their team (individuals and subcontractors). This information may be used on future procurements and shared with other Owners.>>

#### <<ADDITIONAL CLAUSES>>

<<Insert all standard terms and conditions that are applicable to this Solicitation>> Note, this should not contain Contract/Agreement terms and conditions since this language WILL be contained in that document>>

#### ACRONYMS AND DEFINITIONS

<<Insert those that apply>> For example:

**Buyer:** An Owner employee who is assigned to manage this procurement. Can also be referenced as the contracting officer, solicitation officer, or procurement officer

**Contractor:** Synonymous with Offeror

**Mandatory:** A requirement that must be satisfied. Failure to comply with a mandatory requirement will lead to the disqualification of the Offeror's proposal.

**Proponent:** Synonymous with Offeror.

**Proposer:** Synonymous with Offeror.

**Offeror:** The person, firm, corporation, partnership, or joint venture submitting a proposal in accordance with this RFP.

**Respondents:** Synonymous with Offeror.

**Contractor:** Synonymous with Offeror

Proposal Form A	Proposal Form
Proposal Form B	Contract Approach
<b>Proposal Form C</b>	<b>Narrative Proposal</b>
<b>Proposal Form D</b>	<b>Narrative Proposal as Needed</b>
Proposal Form E	References
Proposal Form F	Transition Milestone Schedule
Proposal Form G	Financial Proposal

For Reference Only Full Legal Review Recommended

# PROPOSAL FORM A – PROPOSAL FORM

**PROJECT INFORMATION**

RFP Number: \_\_\_\_\_  
 Project Name: \_\_\_\_\_

**OFFEROR INFORMATION**

Name of Company: \_\_\_\_\_  
 Web URL: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Number of Years in Business (Under Current Business Name): \_\_\_\_\_  
 Provide your License Number (in the jurisdiction for this project): \_\_\_\_\_

**CONTACT INFORMATION**

Identify an individual that can be contacted for clarification on this proposal

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Telephone: \_\_\_\_\_

**ADDENDA ACKNOWLEDGEMENT**

The Offeror acknowledges receipt of the following addenda, and has incorporated the requirements of such addenda into their proposal. Failure to identify and sign for all addendum may subject the Offeror to disqualification. The Offeror must list all addenda's (by number), then initial and date to confirm that you have received and incorporated them into your Proposal. *The Offeror may add more rows as necessary*

Number	Initials & Date

Number	Initials & Date

Number	Initials & Date

**FINANCIAL INFORMATION**

What is the Offeror's average annual revenue from work completed in the last three (3) years?

Year	Revenue
	\$
	\$
	\$



## CRITICAL TEAM MEMBERS

Identification of the critical project team (shown below), which shall be used by Offeror for the duration of the Contract resulting from this RFP. These individuals cannot be removed or replaced, unless requested or approved to do so by the Owner.

Name of Onsite General Manager \_\_\_\_\_

The Onsite General Manager: this individual shall be the daily single-point-of-contact and the primary point of contact to resolve any issues, cost, contract issues, and answer any questions. This individual will be the project lead for the execution of this contract for the entire duration of the project.

Some other potential critical team members to consider:

Regional Vice President:

Executive Chef:

Catering Director:

## CERTIFICATIONS <<Insert/Modify as Needed>>

No	Criteria	Response*
1	The Offeror is presently engaged in the business of providing the services & work required in this RFP.	True   False
2	The Offeror confirms that it has the financial strength to perform and maintain the services required under this RFP.	True   False
3	The Offeror confirms that they can obtain and maintain all necessary bonding and insurance as required on this project.	True   False
4	The Offeror can provide (if requested) financial records for the organization for the past three years.	True   False
5	The Offeror has not had any contracts terminated by the Owner (within the past five years).	True   False
6	The Offeror certifies that it is not currently debarred, suspended, proposed for debarment, or declared ineligible for award by any Governmental entity.	True   False
7	The Offeror certifies, within the last 5 years, they have not been convicted or had judgment rendered against them, or any employees for: fraud, embezzlement, theft, forgery, bribery, falsification or destruction of records, false statements, or tax evasion.	True   False
8	The Offeror does not have any judgments, claims, arbitrations or suits pending/outstanding against your Company in which an adverse outcome would be material to the company?	True   False
9	The Offeror is not (now or in the past) been involved in bankruptcy or reorganized proceeding	True   False
10	The Offeror has never, any time, failed to complete a project	True   False
11	The Offeror certifies that they do not have any (real or perceived) conflicts of interest with the Owner	True   False

\* Please attach additional information on any subject where the Offeror responded "False" to a question above. Failure to answer may be grounds for disqualification.

## STATEMENT OF CERTIFICATIONS AND ASSURANCES <<Insert Company Standard Language as Needed>>

The Offeror does, hereby, expressly affirm, declare, confirm, certify, and assure ALL of the following:

1. The Offeror has thoroughly reviewed this RFP, contract documents, including the pro forma agreement, and all pertinent appendices, exhibits, and attachments include as part thereof, and that we fully understand all elements required for the full completion of the project as defined therein.

2. The Offeror further certifies that, if selected as the successful firm, we will enter into the contract agreement included with this RFP.
3. The prices in his Proposal have been arrived at independently without collusion, consultation, communication or agreement for the purposes of restricting competition as to any matter relating to such prices with any other firms or with any other competitor.
4. The Prices quoted in his Proposal have not been and will not be knowingly disclosed directly or indirectly by respondent to any other firm or competitor prior to the final date and time for submission of such proposal.
5. No attempt has been made or will be made by respondent to induce any other person, partnership, or corporation to submit or not to submit a proposal for the purpose of restricting competition.
6. The Response submitted in response to the RFP shall remain valid for at least 30 days subsequent to the date of the Response opening and thereafter in accordance with any contract pursuant to the RFP.

**By signature below, the signatory certifies legal authority to bind the responding entity to the provisions of this RFP and any contract awarded pursuant to it. The Owner may, at its sole discretion and at any time, require evidence documenting the signatory's authority to be personally bound or to legally bind the responding entity.**

**DO NOT SIGN THIS DOCUMENT IF YOU ARE NOT LEGALLY  
AUTHORIZED TO DO SO BY THE ENTITY RESPONDING TO THIS RFP.**

**SIGNATURE & DATE:**

\_\_\_\_\_

**PRINTED NAME & TITLE:**

\_\_\_\_\_

**NAME OF FIRM:**

\_\_\_\_\_

**DATE:**

\_\_\_\_\_

For Reference Only Full Legal Review Recommended

# PROPOSAL FORM B – CONTRACT APPROACH

SPECIAL REQUIREMENTS: This Submittal Form must not contain any names that can be used to identify who the Offeror is, must not identify the Offerors cost/fee, and must not exceed the page limits specified in the RFP (reference RFP Sections 4.5).

For Reference Only Full Legal Review Recommended

# PROPOSAL FORM C – NARRATIVE PROPOSAL

<<Insert Requirements/Format>>

For Reference Only Full Legal Review Recommended

# PROPOSAL FORM D – NARRATIVE PROPOSAL

<<Insert Requirements/Format>>

For Reference Only Full Legal Review Recommended

## PROPOSAL FORM E – REFERENCES

Provide a list of client references for the Offeror and each key individual that is listed in Submittal Form A. The references should be on similar projects or services that closely match size, complexity, and needs outlined in this RFP. The references must be from the end-client or users of the project or service, and not third-party consultants.

### REFERENCES FOR OFFEROR/FIRM (Provide 3-5 references)

NO	CONTACT NAME	ORGANIZATION NAME	PHONE	EMAIL	PROJECT NAME	DATE COMPLETED	AWARDED COST/SIZE
1							
2							
3							
4							
5							

### REFERENCES FOR KEY INDIVIDUAL (ONSITE GENERAL MANAGER) (Provide 2-3 references)

NO	CONTACT NAME	ORGANIZATION NAME	PHONE	EMAIL	PROJECT NAME	DATE COMPLETED	AWARDED COST/SIZE
1							
2							
3							

For Reference Only Full Legal Review Recommended

# PROPOSAL FORM F – TRANSITION MILESTONE SCHEDULE

For Reference Only Full Legal Review Recommended

# PROPOSAL FORM G – FINANCIAL PROPOSAL

## SECTION 1 – TOTAL FINANCIAL CONTRIBUTION

The Offeror is required to provide a clear breakdown as indicated in this Submittal Form. The Offeror’s Total Project Cost shall include the cost for everything that is necessary to meet the intent of the Owner as described in this RFP, including, but not limited to: materials, products, labor, subcontractors, suppliers, equipment, applicable taxes, fees, overhead, profits, travel, direct and indirect costs, etc. Pricing shall include complete shipment and delivery of all equipment to the project site unless otherwise stated. All Federal, State, Provincial and Local taxes, fees, assessments, and tariffs and the cost of all required insurance are included in this Proposal Cost. If selected to perform this work, the Offeror agrees, as a condition of this proposal, to submit evidence satisfactory to the Owner of our financial ability to perform all work covered by this proposal.

No	YEAR	Minimum Guaranteed Annual Commission		Capital Investment Contribution <sup>1</sup>	Equipment Replacement Reserve <sup>2</sup>	Other <sup>3</sup>
		(\$)	(%)	(\$)	(\$)	(\$)
1	FY 2014-15	\$	%	\$	\$	\$
2	FY 2015-16	\$	%	\$	\$	\$
3	FY 2016-17	\$	%	\$	\$	\$
4	FY 2017-18	\$	%	\$	\$	\$
5	FY 2018-19	\$	%	\$	\$	\$
6	FY 2019-20	\$	%	\$	\$	\$
7	FY 2020-21	\$	%	\$	\$	\$
8	FY 2021-22	\$	%	\$	\$	\$
9	FY 2022-23	\$	%	\$	\$	\$
10	FY 2023-24	\$	%	\$	\$	\$
<b>TOTAL:</b>		\$		\$	\$	\$

<sup>1</sup> The Capital Investment Contribution must be amortized over the base term of the contract

<sup>2</sup> The Equipment Replacement Reserve must be amortized over the base term of the contract

<sup>3</sup> Include any other additional financial contributions

## SECTION 2 – OVERVIEW OF COMMISSIONS

Please provide an overview of your annual commissions on sales:

- 1. Meal Plan Sales: \_\_\_\_\_ %
- 2. Retail Sales: \_\_\_\_\_ %
- 3. Catering Sales: \_\_\_\_\_ %
- 4. Conference Sales: \_\_\_\_\_ %
- 5. Summer Conference & Dining Sales: \_\_\_\_\_ %



**SECTION 3 – TRANSITIONING COSTS**

If the Offeror is not the incumbent, the Offeror shall be responsible for all costs associated for transitioning the service from the incumbent to the Offeror. This cost must be included in your Total Financial Contribution (Section 1 of this Attachment). Please confirm that your proposal has accounted for this cost.

Your proposal has accounted and included all costs (if any) associated with transitioning the service to your company:

Yes  
 No

**SECTION 4 – OVERVIEW OF MAJOR CAPITAL INVESTMENTS**

Please provide additional information on any major capital investments included in your proposal including the intended use of the investments.

For Reference Only Full Legal Review Recommended

- Exhibit 1**    **Agreement / Contract**
- Exhibit 2**    **Specs, Drawings, etc.**
- Exhibit 3**    **<<Insert as needed>>**

For Reference Only Full Legal Review Recommended